STATEWIDE PERSONNEL SYSTEM

Manage Position Freeze

November 2014

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Manage Position Freeze Business Process

Business Process Overview
The Manage Position Freeze business process is used to stop all future HR Personnel transaction to an unfilled position. The process steps for to freeze or unfreeze a position are listed in the table below

Process Steps	Role	Description
Initiate Freeze/Unfreeze a Position	HR Coordinator	Enter the details to freeze/unfreeze a position. The HR Coordinator can only initiate based on the reasons indicated in the **Events and Reasons** section below.
Review Documents * (attach supporting documents)	HR Coordinator	Attach documentation (e.g., Hiring Freeze Exception Request form) if requesting to unfreeze a position. **NOTE:** This task is only required when requesting to unfreeze a position.
Agency Approvals	HR Partner	Agency HR Director approval of the freeze/unfreeze request.
	Appointing Authority Partner	Agency Appointing Authority approval of the freeze/unfreeze request.
	Budget and Finance Partner *	Agency budget approval of request to freeze or unfreeze for budget reasons (see list of valid reasons in the **Events and Reasons** section below).
DBM Approvals *	Budget Administrator	DBM Office of Budget and Analysis budget approval of Agency requests to unfreeze positions.

NOTE: Approval routing is based on the reason selected when initiating the business process. Steps marked with an asterisk (*) are not always required.

Events and Reasons
The table below includes valid reasons for the Manage Position Freeze process. It also includes the initiator for the freeze or unfreeze reason.

Event	Reason	Initiator
Freeze a Position	Freeze Position, Headcount or Job Group Freeze>Agency Budget Frozen	HR Coordinator
	Freeze Position, Headcount or Job Group Freeze>Agency Frozen	HR Coordinator
	Freeze Position, Headcount or Job Group Freeze>DBM Frozen	DBM OBA
	Freeze Position, Headcount or Job Group Freeze>DBM CAS Frozen	DBM CAS
	Freeze Position, Headcount or Job Group Freeze>DBM CAS Frozen >Change in Functions/Reassigned	DBM CAS
	Freeze Position, Headcount or Job Group Freeze>DBM CAS Frozen >Incorrect Employee Status	DBM CAS
	Freeze Position, Headcount or Job Group Freeze>DBM CAS Frozen >Incumbent Unique Quals	DBM CAS
	Freeze Position, Headcount or Job Group Freeze>DBM CAS Frozen >Min Quals/Wrong Class	DBM CAS
	Freeze Position, Headcount or Job Group	DBM CAS

Event	Reason	Initiator
	Freeze>DBM CAS Frozen >Overclassified	
	Freeze Position, Headcount or Job Group Freeze>DBM CAS Frozen>Related Position Change in Functions/Reassigned	DBM CAS
	Freeze Position, Headcount or Job Group Freeze>DBM CAS Frozen>Related Position Incumbent Unique Quals	DBM CAS
	Freeze Position, Headcount or Job Group Freeze>DBM CAS Frozen>Related Position Min Quals	DBM CAS
	Freeze Position, Headcount or Job Group Freeze>DBM CAS Frozen>Related Position Overclassified	DBM CAS
Unfreeze a Position	Freeze Position, Headcount or Job Group>Unfreeze>Agency Budget Unfrozen	HR Coordinator
	Freeze Position, Headcount or Job Group>Unfreeze>Agency Unfrozen	HR Coordinator
	Freeze Position, Headcount or Job Group>Unfreeze>CAS Review Complete	DBM CAS
	Freeze Position, Headcount or Job Group>Unfreeze>DBM Budget Unfrozen	HR Coordinator

Before you begin…

You will need the following information to complete the Freeze/Unfreeze a Position process:

- Supervisory Organization
- Position Title
- Freeze/Unfreeze Reason
- Freeze/Unfreeze Date
- Attach the Hiring Freeze Exception form

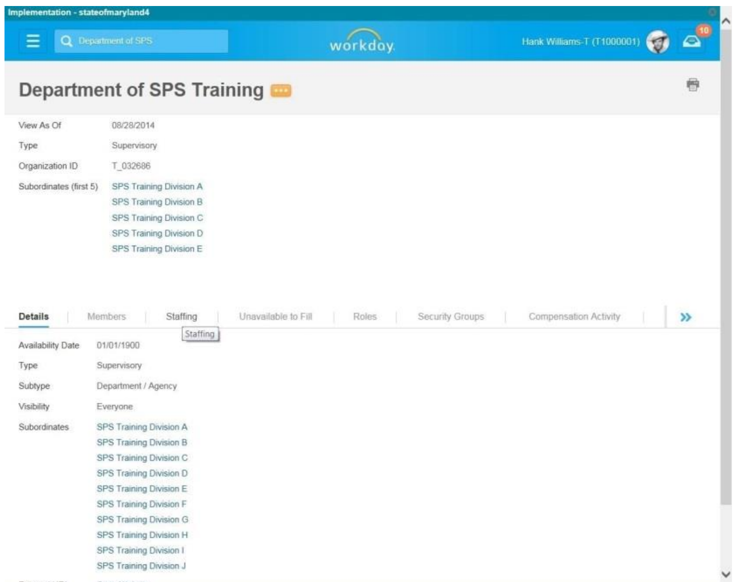
Freeze or Unfreeze a Position

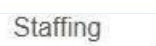
The procedure to freeze or unfreeze a position follows.

Procedure:

1. Type the Supervisory Organization in the Search field.
2. Click the **search**  icon.
3. Click the Supervisory Organization hyperlink.

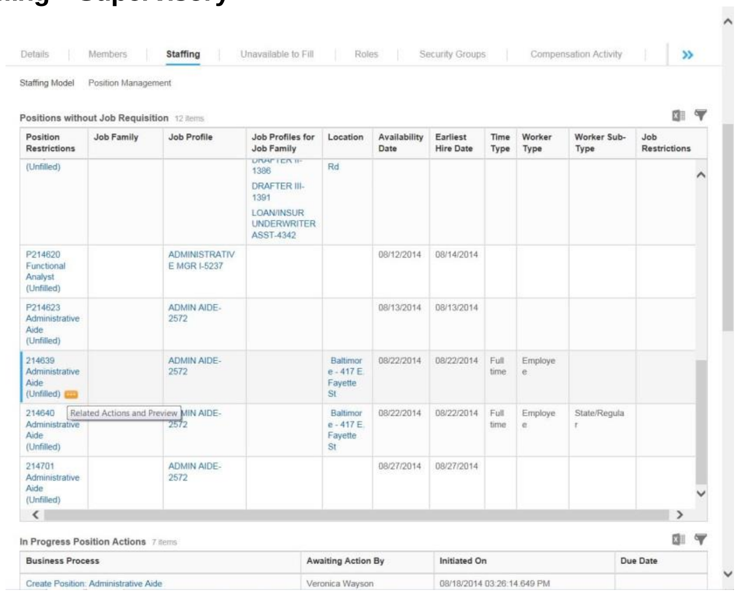
Supervisory Organization Details



4. Click on the Staffing tab. 

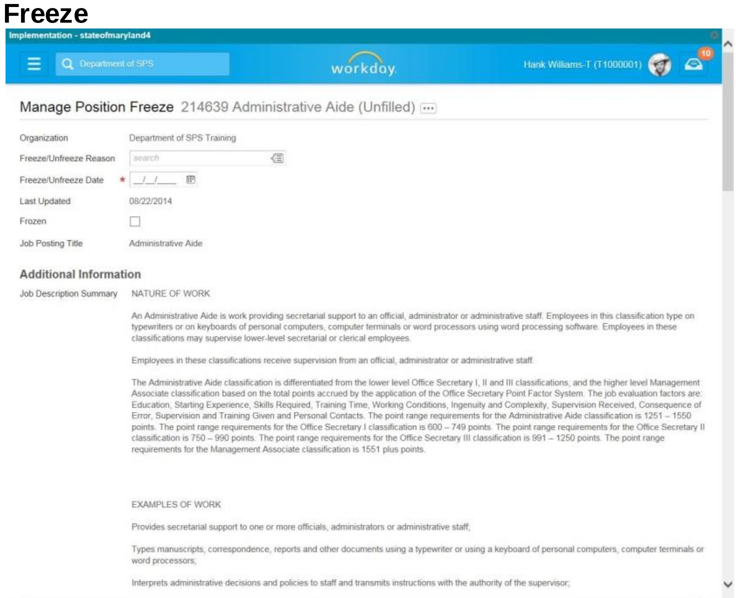
Information: To unfreeze a position or view a list of frozen positions, click on the “Unavailable to Fill” tab. You can also view the “SPMS View All Positions” report.

Organization Staffing - Supervisory



5. Find the unfilled position you want to freeze/unfreeze. Then, click the Related Actions icon next to the position.
6. Hover over Position Restrictions and click Manage Position Freeze.

Manage Position Freeze



7. Type or use the prompt to select the Freeze/Unfreeze Reason.
8. Click the Calendar icon and select the Freeze/Unfreeze Date.
9. Click the Frozen checkbox to select or deselect this option.

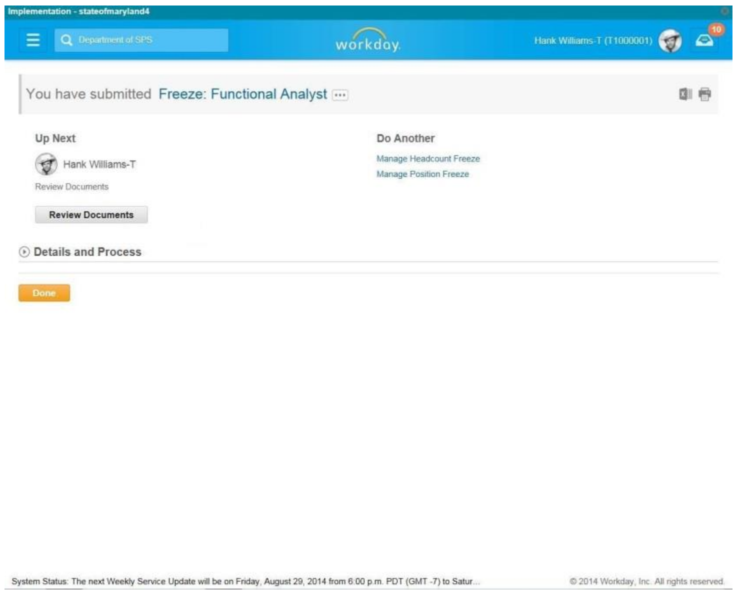
Information: If you are freezing the position, check the "Frozen" checkbox. If you are unfreezing the position, uncheck the "Frozen" checkbox.

10. Click the **Submit** Submit button.

Tip: If you do not want to submit the request at this point, you can also click one of the following buttons:

- Click Save for Later to save your changes but not submit
- Click Cancel to cancel the process and start at another time

Manage Position Freeze



11. Select one of the following options:

If	Then
You froze the position.	1. Click the **Done** button. 2. The System task is complete.
You unfroze a position. **NOTE**: You have to attach required documentation.	1. Click the **Review Documents** button to open the next task. 2. Go to the next section.

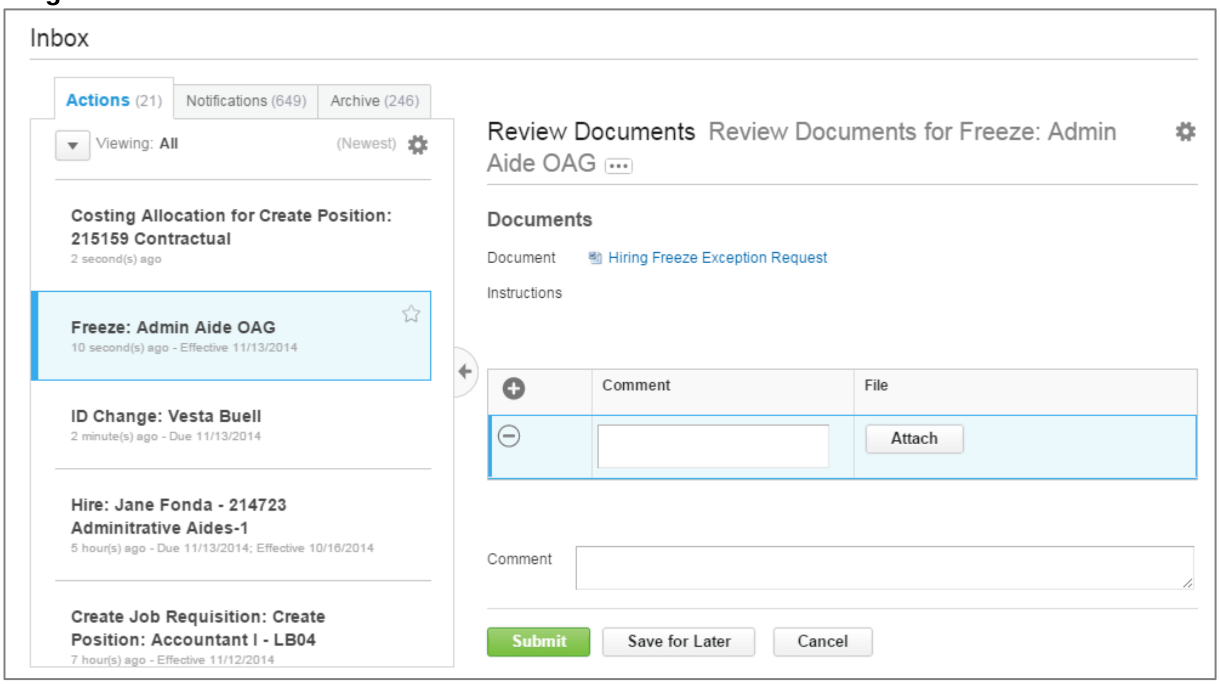
Review Documents (Attach Supporting Documentation)

Attach documentation (e.g., Hiring Freeze Exception Request form) if requesting to unfreeze a position.

NOTE: This task is only required when requesting to unfreeze a position.

This task directly follows the initiation of the unfreeze event. If you do not start the task after initiating the event, go to your inbox, find the “Freeze” task, and complete it from the inbox. Note that the position title displays in the task name. An example of the task that appears in the HR Coordinator’s inbox is shown below.

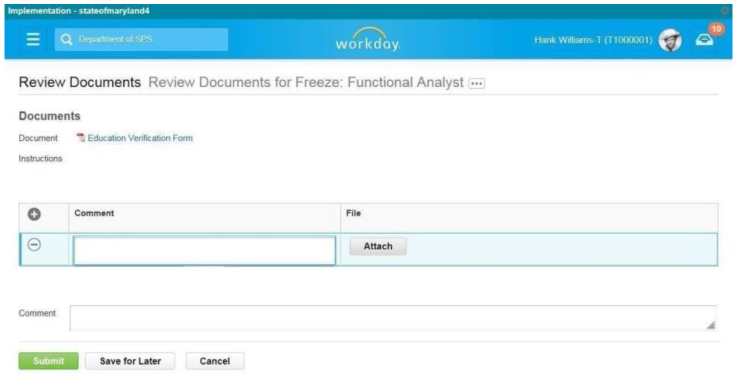
Image: Inbox Freeze – Review Documents



The procedure to attach supporting documents for an “unfreeze” request follows.

Procedure:

Review Documents



1. Click the attach button **Attach** to search for and upload supporting documents.
2. If applicable, enter an attachment comment in the field next to the attachment.
3. Click the **Submit** Submit button.
4. Click the **Done** Done button.

Information: The request must be approved. This is the next step in the process.

Tip: After completing a task in the business process you can view the next step.

- Click the drop-down arrow next to **Details and Process** to expand the section.
- Click the **Process** tab to see the path that the process will take.
- See the *Check the Status of a Business Process* section of this guide for details on how to view, access, or complete other tasks in the process.

5. The System Task is complete.

Check the Status of a Business Process

The status of a business process event can be checked at any time by going to the **Archive** tab within the Inbox of the person who initiated the event.

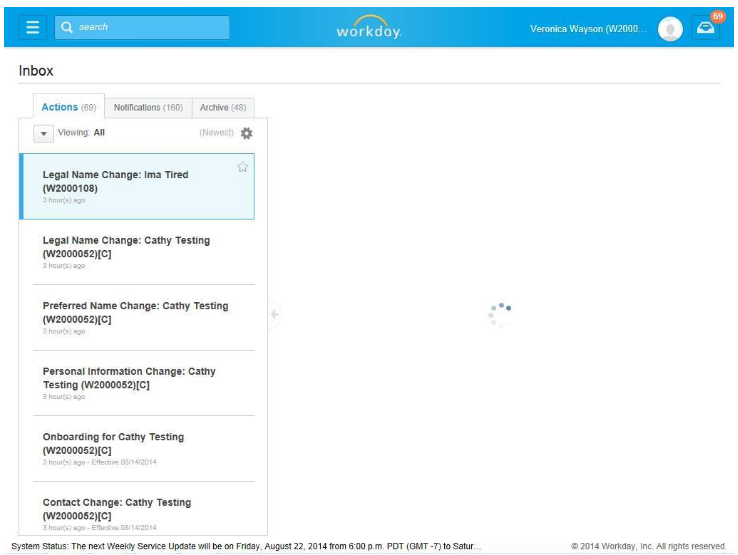
The procedure to check the status of a business process event follows.

Procedure:

1. Select the Inbox  button.
2. Click the **View Inbox** 

hyperlink.

Inbox

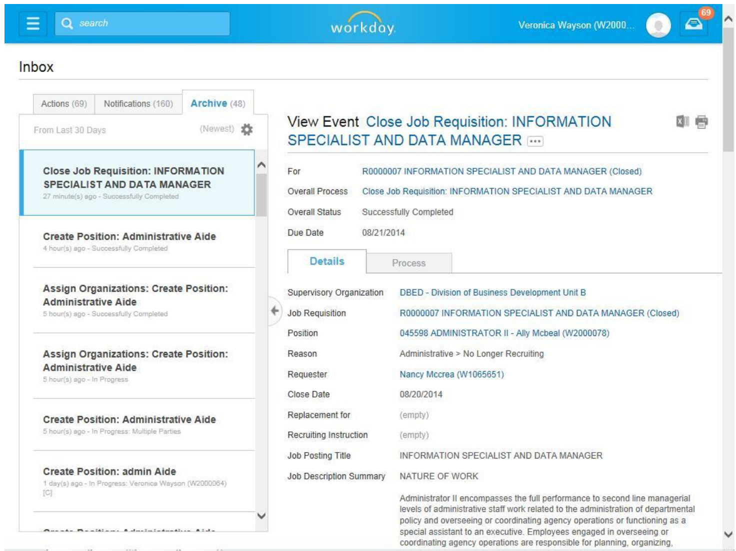


3. Click the **Archive** 

tab.

Information: The **Archive** tab shows all items initiated by you. You can select an item and view the status on the right hand side of the screen.

Inbox

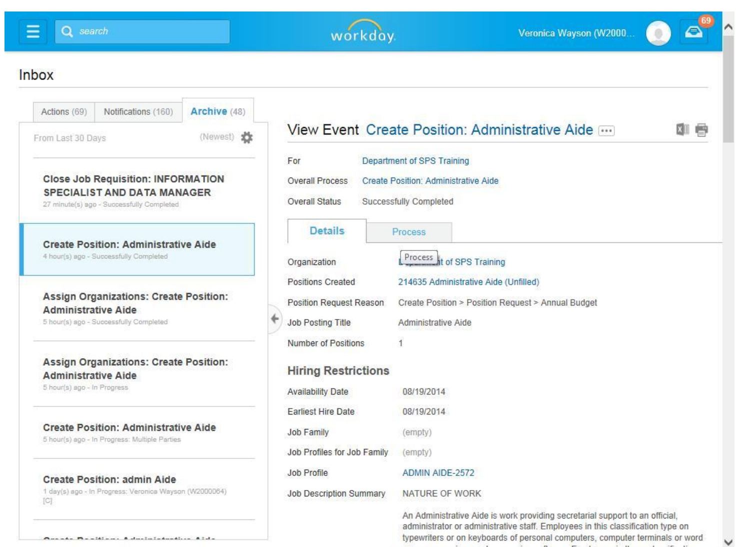


4. Select the item for which you want to view status.
5. Review the transaction details on the Details tab, if desired.
6. Review the Overall Status field at the top-left side of the transaction page.

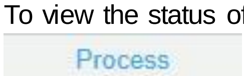
Information: The overall status of a business process displays as….

- "Successfully Completed" when are required steps in the process have been completed.
- "In Progress" when there are some tasks awaiting action by someone in the business process routing.

Inbox

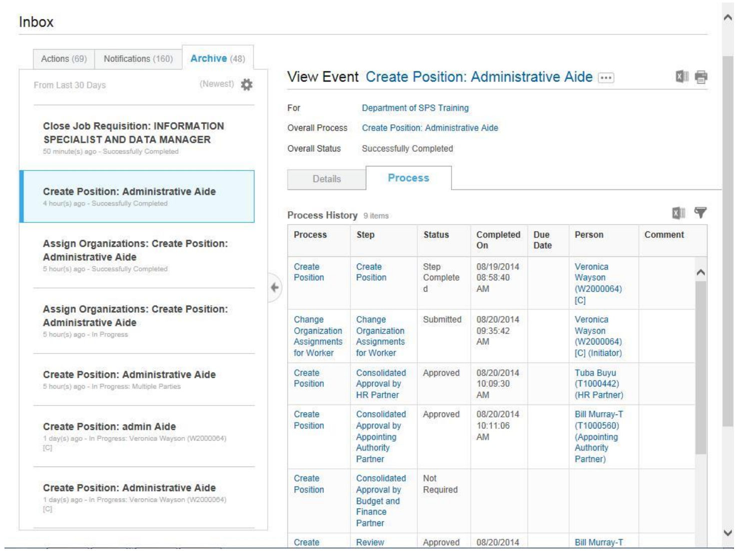


7. To view the status of individual tasks in a business process, click the **Process**



tab.

Inbox



8. Review the status, which steps have been completed/not completed and who has the step for action.
9. The System Task is complete.